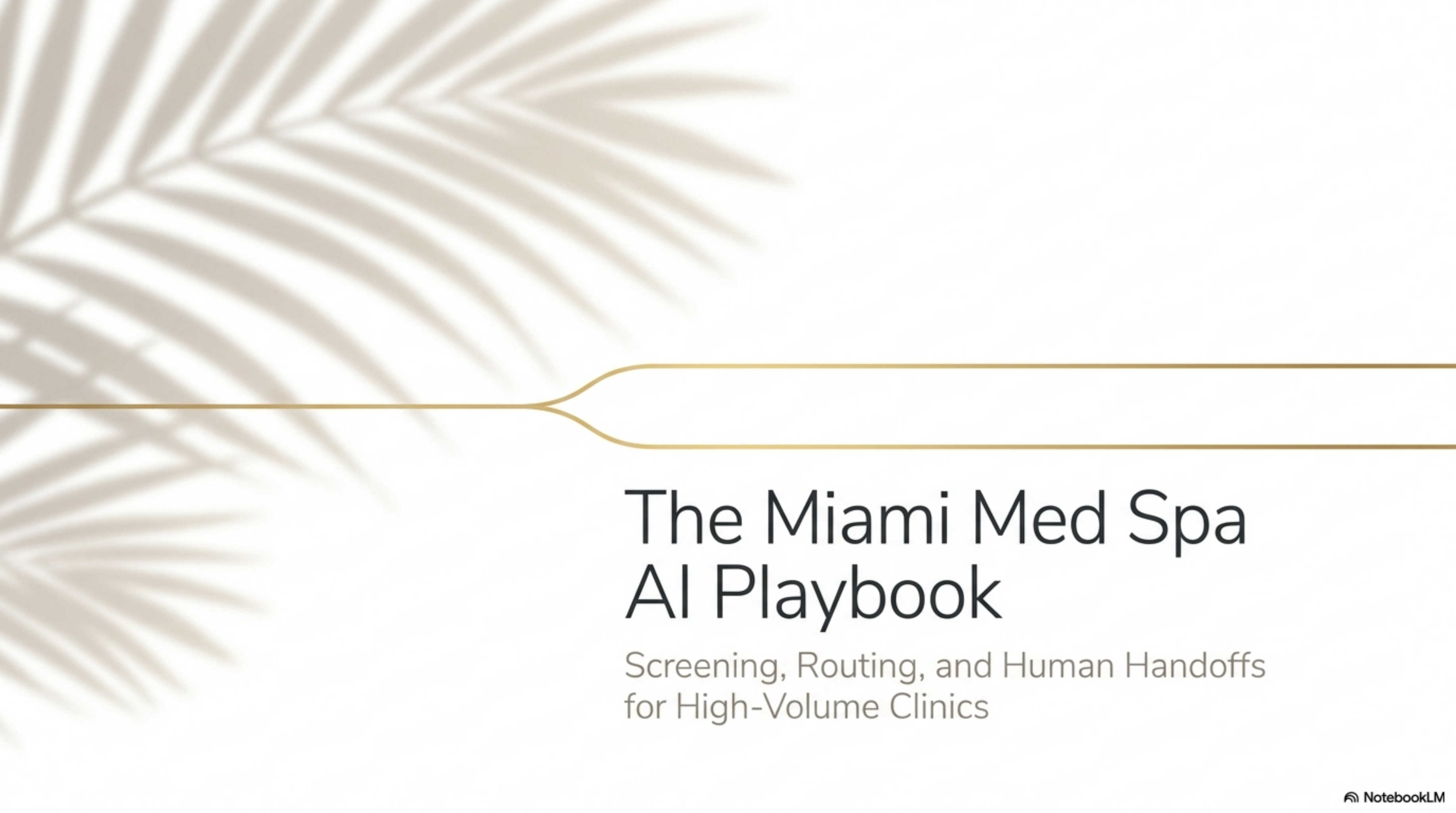
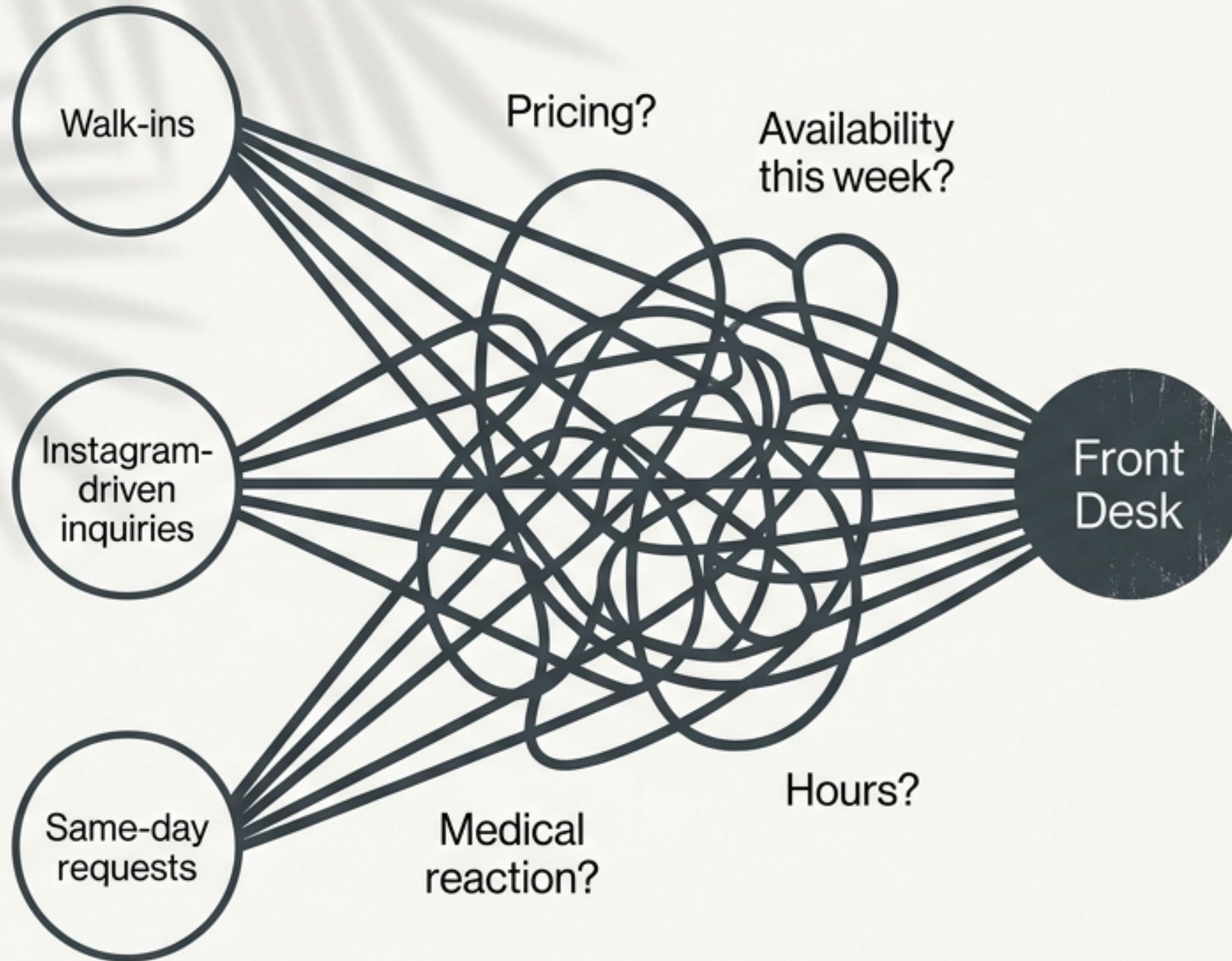




The Miami Med Spa AI Playbook

Screening, Routing, and Human Handoffs
for High-Volume Clinics

The Overload Knot



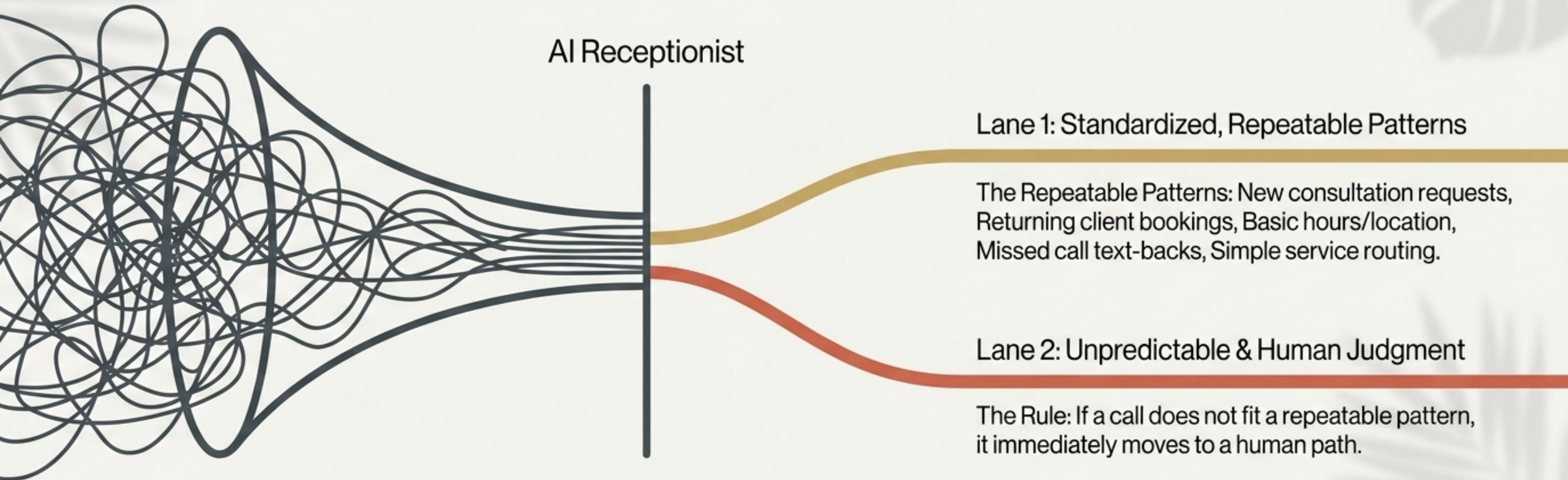
Front desk friction is caused by conversational overload, not slow response times.

Miami med spas do not usually lose leads because the team is slow to respond. They lose them because the first conversation is doing too much.

When pricing, scheduling, social media inquiries, and medical questions hit the desk simultaneously, the workflow breaks down.

Intake must be bifurcated into clear patterns before reaching your staff.

Before automating anything, identify the clear patterns.



A standardized baseline screen extracts exactly what staff need to act.

The first screen is the easiest to standardize. Capturing these six data points gives staff total context without forcing the caller to repeat themselves later.

✓	Name: [Caller Identity]
✓	Callback #: [Direct Line]
✓	Contact Method: [Preferred Channel]
✓	Service of Interest: [Treatment Category]
✓	Client Status: [New vs. Returning]
✓	Preferred Timing: [Scheduling Window]

Pattern recognition dictates the immediate next step for repeatable calls.



Establish strict operational boundaries for human escalation.

	AI Handled (Standard)	Immediate Human Handoff (Clinical/Complex)
Treatment Context	Standard service inquiries	Appropriateness for specific medical situations
Health Status	Routine booking	Complications, reactions, or health concerns
Financials	Basic service rates	Complex pricing conversations requiring judgment
Staffing	General availability	Provider-specific requests
Urgency	General timing	Clinically sensitive or urgent situations

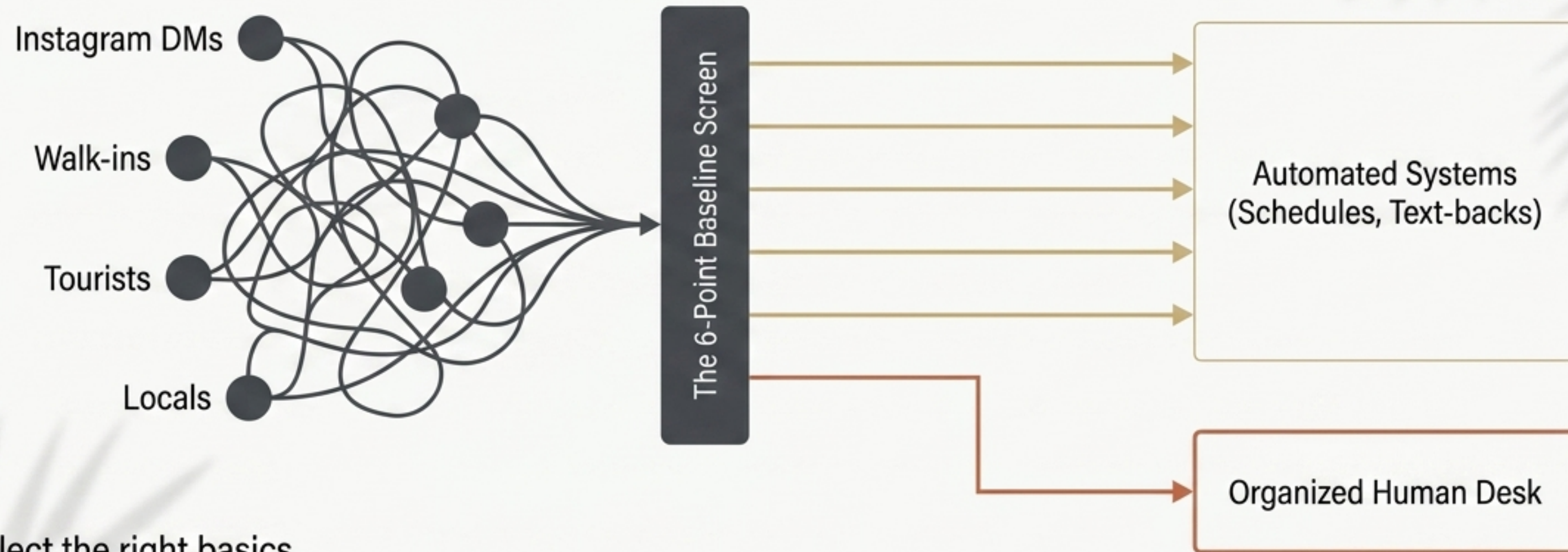
An AI receptionist should never act like a clinician.

Verify logic and safety protocols before system launch

If any of these answers are unclear during testing with real examples, the workflow requires another pass.

- **Identity Check:** Does the AI clearly distinguish between a new consultation and a return visit?
- **Efficiency Check:** Does it ask only the questions staff actually need?
- **Boundary Check:** Does it stop short immediately when the call becomes clinical?
- **Utility Check:** Does it send a summary that is short enough for the front desk to actually use?
- **Preference Check:** Does it reliably preserve the caller's preferred contact method?

The fully integrated intake engine isolates high-value conversations for your staff.



- Collect the right basics.
- Route the predictable calls.
- Get out of the way when the conversation needs human judgment.
- Reduce front desk friction without forcing your intake process into a generic script.